



Morgan Legacy Investment Program
IP1 – Hands-on Investing
Syllabus

Course Description

This course has been designed to help you choose stocks for your portfolio, and provide you with resources for the investment program. This three section course includes the following:

- 1) Investment strategies
- 2) Investment resources
- 3) Quarterly report resources

Objectives

Upon completion of this course, you should be able to:

- Choose a strategy to identify stocks for a portfolio
- Support the stock choices based on documented evidence
- Demonstrate the ability to manage an investment portfolio over time
- Evaluate the performance of the investment portfolio
- Develop a quarterly report that describes portfolio progress

Assignments

There are two (2) required tasks **every quarter**:

Progress Survey: a five-question survey worth 10 points.

Quarterly Report: that summarizes your portfolio performance worth 20 points.

Participation

- 1) Communicate with your Mentor once a quarter.
- 2) Log in the course to submit the Progress Survey and Quarterly Report.
- 4) Participate in the Corner Café discussion board. This is optional, but encouraged.

Course Calendar

This is a multi-year program where the **Progress Survey** and **Quarterly Report** are submitted no later than two weeks following the end of the quarter:

	Due Date
1 st Quarter (January, February, & March)	April 15 th
2 nd Quarter (April, May, & June)	July 15 th
3 rd Quarter (July, August, & September)	October 15 th
4 th Quarter (October, November, & December)	January 15 th